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A CAHNERS PUBLICATION/JULY 1990

CCTV BONUS REPORT
Technology, Connections and More

SECURITY™

THE MAGAZINE FOR SECURITY DECISION MAKERS

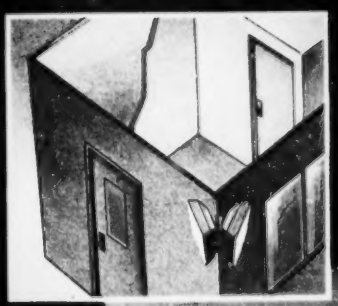
Details on ISC East/ New York Inside!

Security's Low-Threat Diet

Latching on to Keys and Locks

New Player Joins Monitoring Market

Equipment Focus: Security Officer Enclosures



Dennis Olson
Director of Corporate Security
and Transportation Services
The Quaker Oats Co.

SECURITY T.M.

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 7/JULY 1990

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SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SECURITY SURVEY

Security Decides on New Products, Gains Specification and Purchasing Leverage

Security decision makers directly influence the majority of their organizations' product and service purchases, says SECURITY's Second Quarterly Telephone Survey.

Survey results reveal that on the average, security decision makers directed 72 percent of 1989 security purchases. Those who work in finance most likely direct all security purchases.

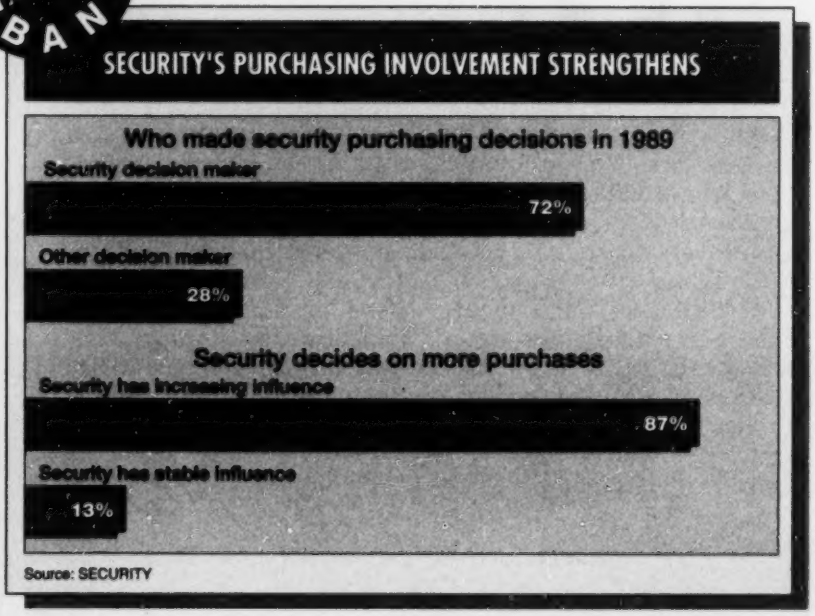
Those who work for the government have the least say when it comes to purchases. Just 8 percent directly influence security purchases.

As the diversity and number of security products grow, so does security's purchasing influence. Among respondents, 87 percent say their direct involvement in product and service specification and purchasing is increasing. Those who work for institutions have the most leverage: 96 percent say their purchasing involvement increases as the number of security products and services increases. Retail also scores high, with 92 percent of respondents exercising greater purchasing power.

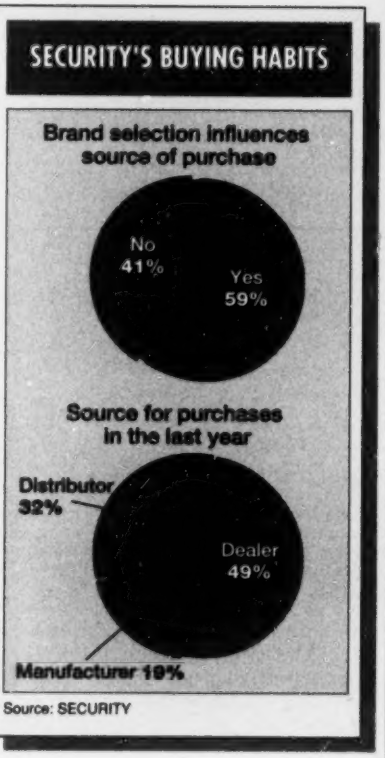
The telephone survey also shows that the frequency of security incidents in the second quarter remained stable for more than half of respondents. SECURITY's quarterly tracking question, "Has the number of security incidents increased, decreased or remained the same over the past three months?" shows that 27 percent experienced an incident increase in the second quarter, a 10 percent drop. Incidents hit retail hardest, with 50 percent citing an increase in the second quarter.

For more on security incident tracking and an introduction to SECURITY's new Business Crime Index, turn to ENDPIECES.

DATA SECURITY BANK



Security directly influenced most purchases of security products and services in 1989. Security's influence grows as new products and services are introduced.



Brand selection influences where security shops for products.

PURCHASING

Brand Loyalty Steers Buyers

Just as consumers frequent specific supermarkets to find their favorite brands, security decision makers go out of their way to buy brands they trust.

According to SECURITY's Second Quarterly Telephone Survey, 59 percent of respondents say brand selection influences where they buy security products. Industrial respondents most likely search for preferred brands.

Where does security turn to buy products? Dealers attract the most buyers. Nearly half of respondents' security purchases in the last year — 49 percent — were chosen through a dealer. Security buyers from institutions most often shop at dealers. Retail security most likely buys from distributors, and government security turns to manufacturers for more than half of purchases.

PUBLIC OPINION

Safety-Minded Consumers Seek Security Tools

Security officers, police and technology aside, consumers feel responsible for their own security. So says "The Security Crisis in America: What Americans Are Worried About," a survey to be released in August by the Consumer Network. The Philadelphia-based organization's survey represents a national cross-section of supermarket shoppers.

Among survey respondents, 87 percent say they feel responsible for their own security. More than half — 57 percent — say police share this responsibility, but only 44 percent agree that police come quickly when called.

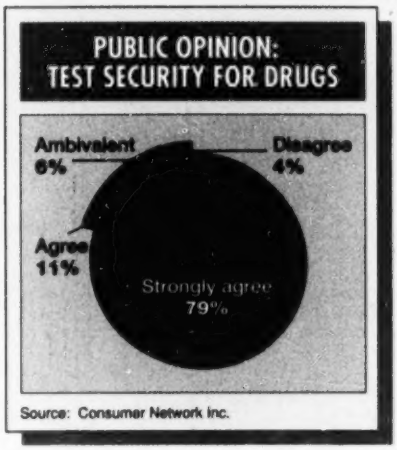
Consumers are very concerned about drug use by security personnel. Seventy-nine percent strongly agree that people responsible for the safety of others should be tested for drugs, even if employee privacy is compromised. However, 79 percent say their personal privacy is compromised by growing demands for personal information.

Visible security technology makes consumers feel safer, the survey finds. Two-thirds of respondents feel more comfortable making transactions at ATMs that feature CCTV cameras. Safety in numbers is also a factor: 44 percent are sometimes afraid to use ATMs if no one else is around.

Respondents overwhelmingly agree that smoke detectors make them feel safe; 99 percent of those under age 35 give them high marks of approval.

Mona Doyle, president of the Consumer Network, says that the market for high-tech security equipment will grow tremendously as people decide to take security into their own hands.

"The market for security equipment will explode due to the widespread acceptance of high technology among younger people," Doyle says. "Population demographics and high concern about security will feed the very large market for new devices."



The safety-conscious public agrees that security personnel should be tested for drugs.

NEWS

Security Wrap-Up: White Collar Crime, Robbery

▶ According to several sources of national statistics, white-collar arrests have surged between 48 percent and 300 percent since 1971 and account for more than one-quarter of case filings in the U.S. District Court. Street crime costs about $12 billion a year, but executives and store clerks steal between $40 billion and $200 billion annually.

▶ New York City has surpassed Detroit as the robbery capital of the United States. New York City saw 1,271 robberies for every 100,000 people in 1989, one every six minutes. Detroit had 1,095 and Washington, D.C. reported 1,055. Demand for guns and bullet-proof clothing rose in 1989.

▶ U.S. officials installed the first plastic explosives detector in a foreign airport in time for the summer travel season. The location: London's Gatwick Airport.

▶ Despite political changes in Eastern Europe and improved relations with the Soviet Union, the U.S. government's list of hostile or "designated countries" remains unchanged.

▶ In 1989, 32 percent of America's largest companies required drug tests for all new employees, and 14 percent required alcohol tests. In 1990, 47 percent test for drugs, and 25 percent test for alcohol.

MARKET FOCUS

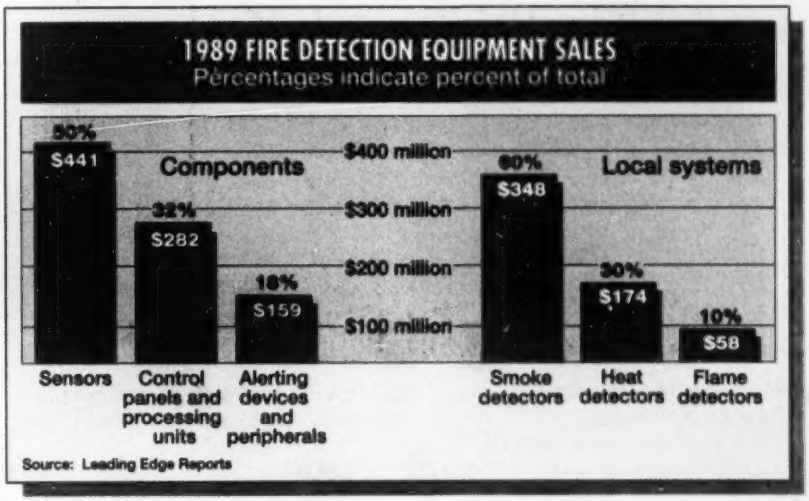
Sensors Lead Fire Detection Equipment Sales in 1989

Total retail sales of equipment to detect smoke, heat and flames amounted to $882 million in 1989, according to the Security Products & Services Report from Leading Edge Reports, Cleveland Heights, Ohio.

Fire detection equipment in the United States during 1989 represented the third largest segment of the electronic security equipment market, behind intrusion detection and electronic article surveillance, the survey says.

Sensors led fire detection equipment sales in 1989 at $441 million. Smoke detectors came in second, with sales reaching $348 million or 60 percent of the local fire detector market.

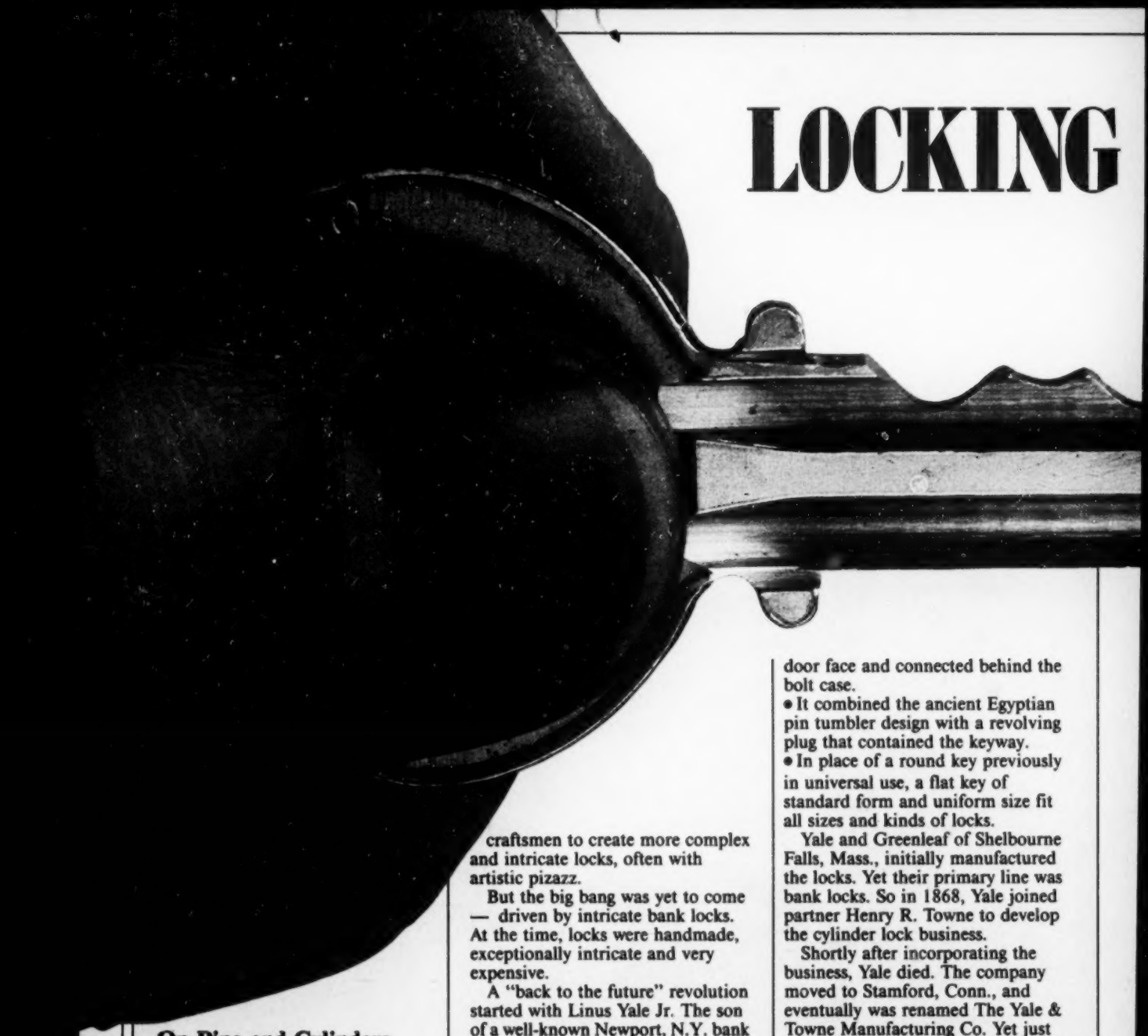
Of the $882 million, only 25 percent was spent on equipment to protect residences. This is a shift from the early 1980s when the residential market represented up to 40 percent of fire detection equipment sales.



Sensors led fire detection equipment sales in 1989. Demand for detection equipment is expected to grow 6 percent annually through 1992 to more than $1 billion.

The Leading Edge report predicts that commercial, institutional and industrial demand for fire detection will continue to rely heavily on retrofit applications, as new construction activity in these areas is expected to remain modest through 1992. The report points out that the life of most fire detection equipment is 10 to 15 years, and installations were high during the 1970s.

LOCKING



On Pins and Cylinders

Security's history started with the lock. The earliest mechanical lock dates back 4,000 years. A wooden Egyptian pin tumbler lock used a system of pins within a hollow bolt.

The ancient Greeks made what today seems a common sense breakthrough — they put the lock inside the door rather than outside. Romans first made locks from iron and brass rather than wood and produced pick-resistant warded locks, using small internal projections to obstruct the keyway.

Technology developed slowly. Improved production permitted craftsmen to create more complex and intricate locks, often with artistic pizazz.

But the big bang was yet to come — driven by intricate bank locks. At the time, locks were handmade, exceptionally intricate and very expensive.

A "back to the future" revolution started with Linus Yale Jr. The son of a well-known Newport, N.Y. bank lock manufacturer, Yale created a series of new locks: "Infallible," "Magic,"and "Double Treasury," which established him as the leading lock expert of the day.

In 1862, Yale's Monotor Bank and Double Dial Bank locks marked a transition from key locks to dial or combination locks.

At the time, Yale also experimented with the Egyptian pin mechanism. Patents in 1861 and 1865 set the stage for Yale's most important invention, the "Cylinder Lock." Standards were set:

- The key mechanism was in a separate cylinder inserted in the door face and connected behind the bolt case.
- It combined the ancient Egyptian pin tumbler design with a revolving plug that contained the keyway.
- In place of a round key previously in universal use, a flat key of standard form and uniform size fit all sizes and kinds of locks.

Yale and Greenleaf of Shelbourne Falls, Mass., initially manufactured the locks. Yet their primary line was bank locks. So in 1868, Yale joined partner Henry R. Towne to develop the cylinder lock business.

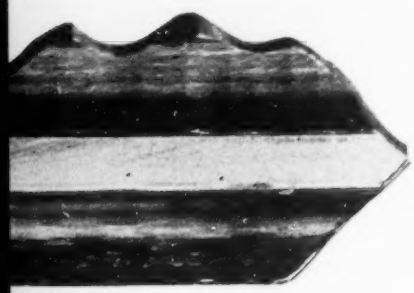
Shortly after incorporating the business, Yale died. The company moved to Stamford, Conn., and eventually was renamed The Yale & Towne Manufacturing Co. Yet just prior to his death, Linus Yale pushed another innovation that helped spread what is today's dominant security device.

This complementing impetus was the U.S. Post Office, when it adopted Yale's post office lock boxes, with a flat-key operated lock.

Also in the inventive 19th century, U.S. lock makers mass-produced locks from cast iron rather than from England's wrought iron. Cost fell and competition heated up. Today, scores of manufacturers produce residential, commercial and high security locks as well as specialty items.

UP YOUR ASSETS

High security, specialties revitalize keys and locks.



By Bill Zalud
Editor

Used for security longer than any other device, key and lock systems have gained new uses, particularly in high security and specialty areas.

Last year, security purchased more locks than access control, CCTV, intrusion and fire systems. Not the biggest dollar purchase (CCTV takes that honor), locks still are a first and only defense for many organizations.

There's also something downright comforting about these 4,000-year-old mechanical systems. (See "On Pins and Cylinders," opposite page.)

"Nothing beats a sturdy lockset and high security cylinder for pure physical protection," contends Mike Crowder, sales and customer service supervisor, Assa Inc., Romeoville, Ill. And business agrees: Crowder estimates 25 to 30 percent growth in high security units.

Better Barrier Protection

"There are two uses for these locks: Securing an area off-hours and entry control," says R.E. Timm, president, R.E. Timm & Associates, Hinsdale, Ill. In each case, users want a quality product, higher security and low maintenance, says Bill Edwards, CML, key records manager at Yale Security, Charlotte, N.C.

"Emphasis has changed a bit from physical security to key control," says Crowder. Bad guys still strong-arm, kick, hack and beat at locks, but most are beyond that, adds Joe Trombetta, marketing and sales manager, Esmet, Canton, Ohio.

High Security Components

One high security lock essential is composition. Mostly brass, there's also hardened steel and alloys, notable at points of attack. "Above all, they must resist forced entry," says Mark Imhof, product manager at Abloy, Dallas.

Some boast interchangeable cylinder cores for quick core change on-site. "The faster you change a compromised core, the better," points out Indianapolis-based Best Lock's Russell Best, senior vice president. His grandfather, Frank, invented what's become an industry hit. "Before, you had to change the entire lockset. Now you simply replace the core, usually from stock on hand," Best comments.

Tumbler Gymnastics

Tumbler design adds "resistance to picking and jimmying," adds Imhof. There are spring-loaded pin tumblers; 15 and 21 pins compared to the usual six; lift and twist; and even rotating tumblers.

Another high security innovation is the unique keyway. "Legally protected by the maker, a keyway can cover an industry, region or nation," says Crowder. "Very large users may have their own keyway."

Master keying and key control also are vital security features. Master keying targets groups of keys for levels of locks. Master key systems can cover thousands of keys or two. "One key can lock and unlock. By cutting a second key differently, another key can lockup but not open the lock," says Imhof.

Key control limits key duplication and distribution of blanks. "The higher the security," says Phil Willmott, vice president and general manager, door security division, Medeco, Salem, Va., "the harder it is to access keys and blanks."

The manufacturer, local locksmith or, in some cases, customer cuts keys with special equipment and materials. "It's not like your old system. You should understand the differences before starting it," warns Willmott.

Also look at the type and strength of your door, strikes, closers, jamb. Adds Timm, "What good is the best lock with a false ceiling or unguarded windows?"

Special Handling for Exits

Some doors need extra handling.

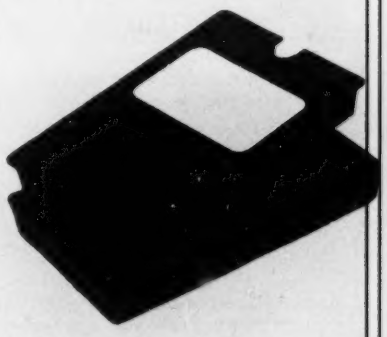
"About two to three percent of all doors are covered by life safety and emergency exit requirements," comments Bob MacDonald, president, Detex Corp., New Braunfels, Texas. Codes mandating unimpeded exit in emergencies vary, depending upon jurisdiction and occupancy.

"It's controversial," suggests Vince Frallicciardi, marketing vice president, Securitron Magnalock, Torrance, Calif. "There's a contention between security and life safety. Mechanicals just don't

Unusual Keyless Lockbox

Keysure is more than a nifty, low-cost key control product. It's Len Sideri's passion. "It's all by itself — it's that unique," boasts Sideri of his pride and joy plastic keyless lockbox.

It can hold a key, password, disaster control information, anything that fits inside. Getting in breaks the box permanently and visibly. "You know if you have a compromise at a glance. Key control's all over the lot. You need accountability beyond what a locksmith or manufacturer provides." The lockboxes also come as part of a key control cabinet. Keysure is in New York City. For details, circle 165.



A keyless lockbox from Keysure visibly shows a compromise of a key inside it.

Emphasis Has Migrated From Physical Security to Key Control

provide security. Employees are as concerned about people getting in as they are about getting out in an emergency."

Mechanical exit controls include push bars and panic bars: Lock and strike and a push lever or a horizontal rod across the door.

For increased security, free egress and delayed exit electric and electromagnetic units marry into monitoring systems. Unique and newer is delayed egress. "An exit attempt starts a delay reaction and exit alarm. After a set time, usually 15 seconds, the door opens," says Rich Paladino, vice president of sales, Alarm Lock Systems Inc., Amityville, N.Y.

"Unfortunately, there are no real electronic standards for unlocking an exit door — only mechanical ones. Fire marshals and business need educating," says Fralliciardi. Standards are slowly changing, says MacDonald. "The Builders Hardware Manufacturers Association is near standards to cover electromagnetic and delayed egress locking. The next step is ANSI."

Specialty locks also are hot. They cover "applications that, because of size, constraints, remoteness of location

WHO BUYS WHAT

Security involvement in keys and locks

	Responsibility	1990 Purchases
High security locks	77%	52%
Key controls	73%	52%
Padlocks	70%	65%
Exit controls	69%	52%
Deadbolts	65%	48%
Electronic locks	64%	49%
Push-button, keyless locks	64%	49%

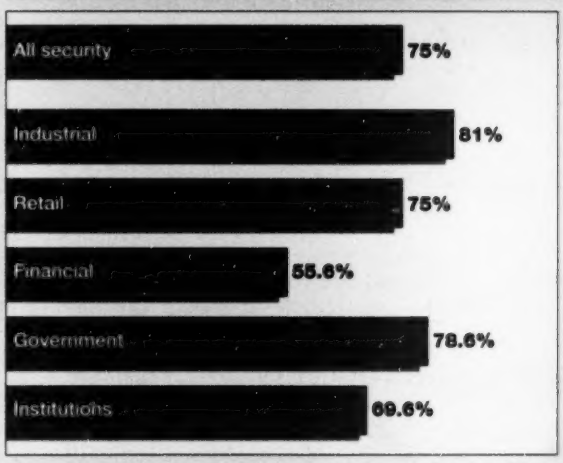
Hot growth

There's consistent purchasing of mechanical and electromechanical locks. Totals equal more than 100% because of multiple answers.

Source: SECURITY

COVER THE EXITS

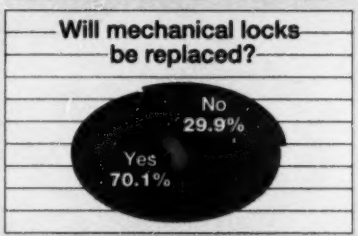
Who purchases door control, panic hardware



Door control and panic hardware protects exit doors while also meeting local and fire regulations. Total is more than 100% because of multiple answers.

Source: SECURITY

UPGRADING LOCKS

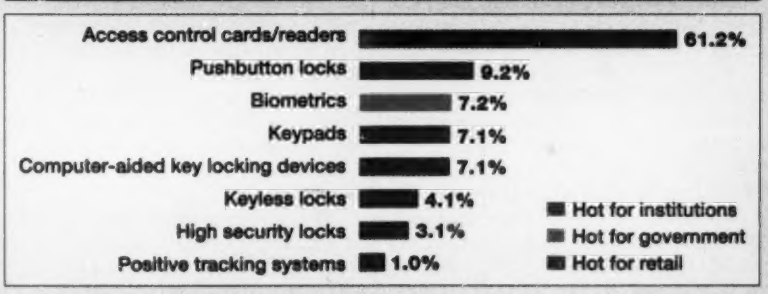


A vast majority of security decision makers believe traditional keys and locks will be replaced with computerized products of some kind.

Source: SECURITY

LOCK REPLACEMENTS

What will dominate as replacements



Access control cards and readers will dominate the next step beyond traditional keys and locks, according to security decision makers.

Source: SECURITY

or fail-safe need, demand special handling," says Durahm McCauley, executive vice president, McGard Inc., Buffalo, N.Y. Many are engineered into gear being protected.

Specialty Keys and Locks

Some traditional lock companies serve specialized needs. "We have lockdown devices and locks for cabinets, desks, credenzas and telephones, among others," says Best.

There are niche products, "like high security surface mount locks," says Trombetta. "McDonald's uses our quick-release unit on outdoor coolers."

Another approach is McGard. It created a high security fastener to protect car tires. McGard's high security fasteners now protect gear in the oil industry, utilities and even corrections. The McGard system factors in torque, or the twisting and turning as the key is applied. Computer-generated patterns of torque help make keys and duplicates.

Manhole cover and telephone locks are popular McGard items. "A fire hydrant lock installs without power tools. The operating wrench goes on top of the fire wrench," reports McCauley.

Serving military, defense contractor and business, Sargent & Greenleaf, Nicholasville, Ky., sees additional promise in combination and time locks. Says Gary Kepler, director of sales and marketing services, "Our new Scrambler three-wheel combination lock automatically repositions the wheels upon opening."

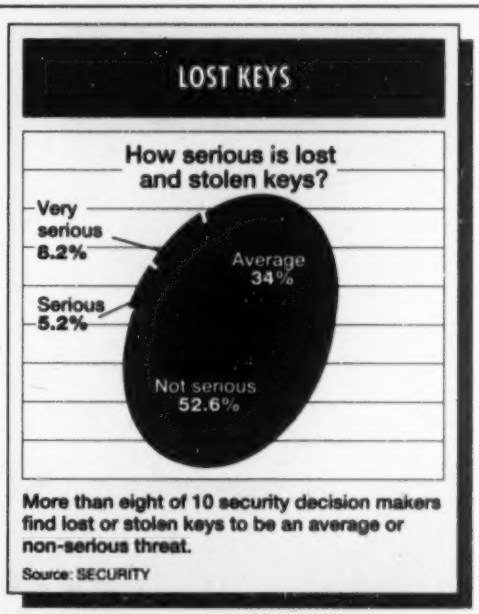
Hybrids Add Second Step

Bridging mechanical and electronic are hybrid locks that combine both.

Lori Lock of Southington, Conn., makes cylinders and locks but also a smart key system. The smart key can open a mechanical lock. "And the electronic lock can fit into a standard door," reports Lori's George Nortonen.

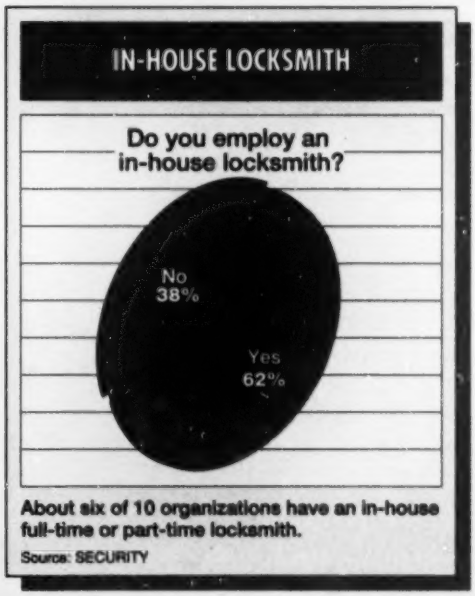
And OSI Security Devices of Sunnyvale, Calif., has a combination electronic push-button and mechanical system — the Omnilock.

More electronic access control than key and lock, some products such as the Intellis System from Schlage Lock, San Francisco, replace the door lock, use some type of card and maintain an audit trail. Rekeying is a matter of programming. □



More than eight of 10 security decision makers find lost or stolen keys to be an average or non-serious threat.

Source: SECURITY



About six of 10 organizations have an in-house full-time or part-time locksmith.

Source: SECURITY

Who's Deciding?

An increasingly crowded field of people source or specify locks.

"Security decision makers, fire alarm companies, architects, subcontractors, alarm dealers, locksmiths, system houses — each sees it differently,"says Vince Frallicciardi, marketing vice president, Securitron Magnalock, Torrance, Calif.

Locksmiths traditionally are the mechanical security industry, according to Mathisen William, executive director of the Associated Locksmiths of America (ALOA), Dallas.

ALOA represents entrepreneurial locksmiths and has an industry-recognized certification program.

Manufacturers also train locksmiths in improvements and new products. "We support the locksmith," says Gary Kepler, director of sales and marketing services, Sargent & Greenleaf, Nicholasville, Ky. The company — like others — offers factory certification on products.

In-house locksmiths also are important. A surprisingly high 62 percent of security decision makers, according to the SECURITY DATA BANK, say they employ an in-house locksmith. Some are part-time or do limited lock maintenance work.

ENDPIECES

Alerts and trends for your planning effort.

NEXT ISSUE

Tom Nagle

Read how one security department's efforts pay the bills. SECURITY's **August cover article** looks at security operations at Levi Strauss, where security tracks down enough counterfeit apparel each year to compensate for security expenditures several times over. Tom Nagle, director of corporate security and administration, takes on duties ranging from counterfeit product investigations to cafeteria services to emergency planning.

Also in August, learn how to get more out of **security surveys.** Security decision makers offer tips on survey benefits and how to conduct better surveys.

Next issue's EQUIPMENT FOCUS looks at the variety of portable two-way radios on the market and the accessories and replacement parts that work with them. FCC licensing will also be discussed. SERVICES zeros in on facility management services.

READER FEEDBACK

SECURITY welcomes your letters, phone calls and comments. This comes from John Forbes, vice president of marketing, Holophane Co. Inc., Newark, Ohio.

"I have read with concern recent promotions for warranties on lighting fixtures that could be misleading to your readers. At first glance, it seems that the manufacturer is [covering] the entire fixture for five years when, in reality, the five-year warranty applies only to the ballast — or the fixture's electrical system.

"Most of the time lighting manufacturers offer a one year warranty on their fixtures, which covers both materials and workmanship. If a unit is defective, the manufacturer will correct the defect, at no cost, by repairing the unit or providing replacement parts. This guarantee is good for one year beyond the date of manufacture.

"In Holophane's case, all fixtures are warranted for two years and the HID electrical components for five years.

"We feel that a promotion that implies that the entire fixture is warranted for five years is misleading and costly. If something goes wrong with a unit after the first year that does not involve the electrical system, the customer is on his own. He must bear the expense and the inconvenience of getting that fixture fixed or replaced.

"As always, it pays to read the fine print in a warranty. It can save a lot of time, grief and money."

Send your letters to SECURITY Reader Feedback, 1350 E. Touhy Ave., Des Plaines, IL 60018.

EVENTS

August 12 to 16

The American Correctional Association's 120th Congress of Correction in San Diego. The theme, Proactive Correctional Approach: Building Partnerships for Success, revolves around corrections taking a proactive rather than reactive approach to problem-solving. For information call ACA at (301) 206-5100.

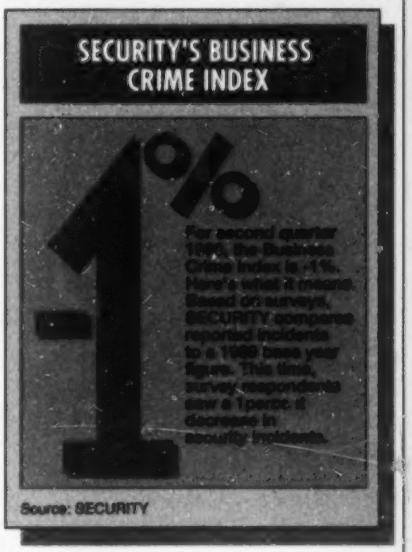
August 13 to 15

The American Society for Industrial Security offers "Statement Analysis: The Art of Obtaining Confessions," to be conducted in Alexandria, Va. The program will analyze truth and deception and pre-employment screening. Call (703) 522-5800 for information.

IN SECURITY

You could say Larry was born to be an officer at a monitoring station.

BUSINESS CRIME INDEX



SECURITY's exclusive Business Crime Index appears quarterly in ENDPIECES.

QUICKIE QUESTION

Before you send in the Reader Service Card for product information, consider this Quickie Question:

Has a key control problem at your organization contributed to an increase in security incidents in the past six months?

If you say YES, circle 170 on the reader service card.

If you say NO, circle 171 on the reader service card.

If key control doesn't apply to operations at you organization, circle 172.

YOUR ANSWERS

In April, SECURITY asked readers if computer viruses have been caught within their organizations in the past year, or if they personally know someone who has experienced a computer virus.

Among respondents, 28 percent say they or a colleague has experienced a computer virus in the past year. Seventy-two percent say neither they nor a colleague has dealt with a computer virus in the last year.